

BUSINESS AND MANAGEMENT CONSULTING SERVICES MSA
Section III, Supplement #14, 11/03

SECTION III - SERVICE CATEGORIES AND PERSONNEL CLASSIFICATIONS

The definitions of the service categories listed below are to be used as guidelines to help ordering agencies determine the most appropriate category (ies) for their projects. The definitions of the personnel classifications are to be used as guidelines to evaluate the experience of the personnel included in the firms' project proposals.

A. SERVICE CATEGORIES

Each service category/subcategory was evaluated individually. The firms in each category/subcategory had to demonstrate a minimum of two (2) years full-time experience within the last five (5) years.

1. Organizational Development

a. Team Development

Assist agency employees to develop the needed skills to work effectively in teams or group. This should include communication principles, group problem-solving models, meeting management skills, team member roles, and dealing with conflict.

b. Problem Solving/Conflict Management

Assist agencies to develop problem solving/conflict management processes that emphasize open communications. Provide a framework for evaluating problems and issues by clearly identifying and documenting relevant goals and objectives. Establish a process that analyzes issues/problems in the context of expected outcomes and suggest corrective actions.

c. Customer Service

Assist agencies to develop necessary skills to provide quality service to both external and internal customers. Also assist with the development and evaluation of customer satisfaction surveys and other customer service evaluation strategies and approaches.

d. Process Improvement

Assist agencies in the application of process improvement methods/tools to current work processes, including statistical analysis, workload and workflow analysis, comparison of similar processes across different programs, cycle time evaluation and reduction, and process streamlining.

e. Program Training

Assist agencies with the development and/or update and implementation of program specific curriculum. Also assist with writing of training manuals.

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- f. Train-the-trainer
Develop instructional materials and design train-the-trainer programs that Include current adult learning methodologies.
 - g. Facilitation
Assist agencies with the planning, facilitation and evaluation of meetings, conferences, retreats and public meetings.
- 2. Strategic Planning
 - a. Strategic Planning
Using methods tailored for the public sector, assist agencies with the development, preparation, implementation and revision of their mission/vision and strategic plan(s).
 - b. Internal and External Environmental Assessment
Assist in the development and utilization of assessment methodologies that look at the factors in the internal and external environments that influence business strategies and pose a threat to the program and/ or organization or provide an opportunity for the organization and/ or program. The external assessment should include future trends and forecasts. The environmental assessment may need to be done as an independent evaluation.
- 3. Department/Program Development, Performance Measurements and Evaluation
 - a. Department/Program Evaluation
Assess organizational effectiveness, structure, resource allocation, teamwork, responsiveness to customers and other appropriate factors through document research, interviews and group discussions, surveys, comparable agency analysis and analysis of best-in-class organizations. Develop recommendations and action plans
 - b. Department/Program/Project Planning and Development
Assist in department/program/project planning, design, implementation, and evaluation. Ensure approaches that link department/program/project goals and objectives to business requirements, assess risk, closely monitor progress and involve key stakeholder groups.
 - c. Department/Program Performance and Outcome Measurements
Assist organizations in developing and implementing performance measurement approaches that consider, both quantitative and qualitative results, and are specific to the public sector. Also specify approaches and methods to evaluate outcomes of policies and programs that are intended to affect the behavior of groups and individuals statewide.
- 4. Fiscal Services-**Note: Agencies need to consider utilizing the Department of Finance (DOF), Office of State Audits and Evaluations (OSAE) as a contractor for Category 4a and 4b. OSAE currently provides these types of services for state agencies through use of an interagency agreement.**

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Subcategories

- a. Department/Program Auditing
Perform independent financial audits of agencies and internal and external programs. Also assist agencies with implementation of new auditing procedures/programs.
- b. Financial Analysis
Assist agencies with budget analysis, cost-benefit analysis salary studies, economic analysis and other related fiscal services on a program and/or department basis.

5. Benefits Consulting Services

Subcategories

- a. Benefit Trend Analysis
Evaluation of current and future benefit trends on a Regional and National basis. Provide comparative data of the State's benefit program to other large employers and to industry standards. Establish performance standards and measures. Evaluate performance of State's benefit program. Make recommendations and develop action plans.
- b. Benefit Program Audits, Actuarial Valuations and Tax Consulting
Perform actuarial valuations of benefit programs and comparisons to other regional and national programs; audit of benefit program financials and proposals; and general consulting on Internal Revenue code provisions and applicability to current and future programs.
- c. Benefit Program Analysis and Development
Analyze, develop, and assist in the negotiation benefit programs for large employers in one or more of the following areas: Dental, Vision, Health, Defined Contribution, Cafeteria Benefit Plans, Worker's Compensation, Flexible Benefits, Employee Assistance, Life Insurance, Long-Term Disability Programs, Safety and Wellness, Salary Administration and other areas as required.
- d. Workgroup Facilitation
Assist with the facilitation of Labor/Management workgroups or coalitions, and other workgroups related to benefit administration
- e. Disability Management Program Development
Assist agencies with the development of an integrated disability management process that includes all of the disability related programs (industrial and non-industrial) and employee benefits.

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6. Investment Consulting Services

Investment Consulting and Portfolio Design

Analyze current and future investment portfolios. Design defined contribution plans including plan administration.

7. Marketing Services

Subcategories

a. Marketing/Public Relations Plan(s) Analysis and Development

Assist agencies with the development and implementation of marketing/public relation plans for current and/ or new programs and services. Also perform analysis of current marketing/public relations plans as to their effectiveness. Analysis will include recommendations and action plans.

b. Marketing and/or Research Surveys

Develop and conduct market and/or research surveys of current and potential markets for agencies' current and future programs and services.

c. Multi-Media Production Services

Assist agencies with the development and production of multi-media projects (e.g. videos and public announcement spots) for current and future programs and services.

B. PERSONNEL CLASSIFICATION

Firms must be able to provide personnel statewide for the following classifications:

a. Principal:

The principal develops study methodologies appropriate to the scope and nature of the project, provides project administration, monitors contract execution, analyzes complex problems, and prepares or edits project deliverables. Principals need a minimum of ten (10) years of full-time experience in the applicable discipline or field of study either as a public sector manager and/or consultant. Principal may also be listed as Owner, Director, Partner or Senior Manager.

b. Senior Level:

The senior level positions are responsible for the day-to-day management of the project activities and assist with the preparation of the project deliverables. The senior level position is responsible for supervision and assignment of all journey level staff, and ensures compliance with all engagement schedules and budgets. The senior level position need a minimum of five (5) years of full-time experience in the applicable discipline or field of study either in the public sector and / or as a consultant. Two of the five years should be in a supervisory position. Also may be listed as Manager, Senior Staff, Senior Associate or Associate.

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c. Journey Level:

The journey level position conducts the day-to-day activities necessary to complete the tasks of each project. The journey level position works under the direction of the senior level position in completing a substantial portion of the detailed work related to each project. Journey level consultants have at least one year of related work experience.

d. Administrative:

The administrative position performs all necessary direct support of each project.